

How to position Portugal in order to attract Chinese tourists traveling independently:

Recommendations for *Turismo de Portugal*

Masters in Management | Master Thesis
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Abstract

Tourism is one of the few sectors where Portugal has clear competitive advantage. Portugal's central tourist authority, *Turismo de Portugal*, with support from the Portuguese Ministry of Economy and Innovation, is currently making a major commitment to developing the sector. With Chinese tourists among the greatest and most impactful (potential) tourists over the next 10 years, Portugal is looking to become a first wave European travel destination.

The purpose of this work project is directed towards investigating how to position the nation brand Portugal in order to attract Chinese tourists traveling independently. Independent travelers are defined as individuals that are not traveling as part of a tour group; they are younger, more educated and affluent, and interested in unique travel experiences where they get to choose where to go, eat and shop on their own.

Further research is required into the current perceptions tied to Portugal as a country to Chinese nationals for the development of a nation brand value proposition and positioning for *Turismo de Portugal*. For this work project, this was done by (1) exploring the current relevant theories and research associated to branding and nation branding, (2) analyzing secondary research on Portugal and its current nation brand profile, (3) and lastly developing primary research mainly based on interviews and conversations with Chinese travelers and experts in Portugal.

The main results formulate a proposal for *Turismo de Portugal* with recommendations on how to position the Portugal nation brand to attract Chinese tourists traveling independently.

Our suggested points of difference predominantly address the hospitality and safety of Portugal, enabling greater differentiation from Spain and other Southern European countries.

Keywords: *branding, nation brand, Portugal, Turismo de Portugal, China*

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List of Abbreviations

AMA	American Marketing Association
CBBE	Customer-Based Brand Equity
CNTA	China National Tourism Association
CRM	Customer Relationship Management
GDP	Gross Domestic Product
NBAR	Nation Brand Architecture
NBEQ	Nation Brand Equity
PODs	Points of Difference
POPs	Points of Parity
SAR	Southeast Asia Region
SWOT	Strengths, Weaknesses, Opportunities, Threats
NBAR	Nation Brand Architecture
NBEQ	Nation Brand Equity
UNESCO	United Nations Educational, Scientific and Cultural Organization
UK	United Kingdom
USA	United States of America

1.0 Introduction

Do travelers and tourists choose their holiday destination on their own? Wally Olins explains as cited in Julier (2008, p. 141):

All countries communicate all the time. They send out millions of messages every day through political action or inaction, through popular culture, through products, services, sport, behavior, arts and architecture. Collectively, all these millions of messages represent an idea of what the nation as a whole is up to, what it feels, what it wants, what it believes in.

Through a range of methods, countries all over the world try to convince travelers that tourism in their country is the best option. This is capitalized on even further through the phenomenon of treating a nation as a brand. The concept enables a nation to differentiate itself through inimitable positioning and make a promise about what unique and welcome experiences it can deliver.

In 2007 Portugal's central tourist authority, *Turismo de Portugal*, together with the Portuguese Ministry of Economy and Innovation drew up a *National Strategic Plan for Tourism*, aimed at "fostering the development of tourism in Portugal" (*Turismo de Portugal*, Portuguese Ministry of Economy & Innovation, 2007). Since, demand for Portugal has been fueled by a range of insightful marketing and Portugal's number of inbound arrivals have increased greatly to reach 17.7 million trips in 2015 (Passport Euromonitor International, 2016). However, as of August 2016, eight of the top ten foreign guests (by country) stem from European countries: UK, Germany, Spain, France, Holland, Ireland, Italy, and Belgium (Travel BI by *Turismo de Portugal*, 2016). For more detailed information see Appendix 1.

Thus, it is suggested that Portugal has yet to establish itself as a distinct nation brand outside of Europe.

The scope of this work project involves the analysis of Portugal as a nation brand and how it stands today within the travel industry. This enables the understanding and development of how Portugal can differentiate itself on the global stage and gain competitive advantage over other nations competing within Europe for tourism. The particular focus is on how to position Portugal in order to attract Chinese tourists traveling independently.

However, despite the newest efforts to boost the Portuguese brand image towards the Chinese market, which has largely been enforced by the *National Strategic Plan for Tourism* and *Turismo de Portugal*, there is little literature regarding Portugal and its positioning for this market.

Thus, the author is largely motivated by the opportunity to investigate and bring hands-on support for *Turismo de Portugal* and their latest challenge on how best to position, promote and expedite the Portuguese nation brand for Chinese tourists traveling independently.

The main contribution of this research is directed towards answering the following questions:

- » What is the current perception of Portugal as a country to Chinese nationals?
- » What positive associations do the Chinese nationals have about Portugal?
- » How can these findings help Portugal differentiate itself on the global stage and gain a competitive edge over other nations for Chinese travelers?

In addition to time restraints this work project faced a range of limitations for the exploratory research with Chinese nationals. Language, cultural constraints, and the lack of availability of Chinese tourists to respond, created large barriers in conducting interviews. To add, respondents showed signs of discomfort in revealing negative perceptions towards Portugal. These restrictions resulted in a more limited sample than initially expected.

2.0 Introduction to Nation Branding

Before taking a closer look at a nation as a brand, it is important to clarify several basic branding concepts. Specifically, what is meant by a brand, brand identity, positioning, image, and brand equity.

2.1 Brand Definition

A brand can be defined in numerous ways. According to the American Marketing Association (AMA), a brand is a “name, term, sign, symbol, or design, or a combination of them, intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of competition” (1995). It is through these differentiating factors, both tangible and intangible, that a brand can create a unique value proposition (Kapferer, 2012). Today, more than ever, a brand has become a powerful tool that enables a story to be shared and experienced to create a long lasting relationship between the brand and consumer. Brands act as a bridge between the consumer and the entity in question. Or, as quoted by Prophet Brand Strategy’s Scott Galloway, “a brand is the face of a business strategy” (as cited in Aaker, 2014, p. 7).

2.2 Brand Management Tools

2.2.1 Brand Identity

Brand identity refers to the character of the brand, or as outlined by Aaker and Joachimsthaler, it is “a set of associations the brand strategist seeks to create or maintain” (2000, p. 40). For the

purpose of this work project, Kapferer's brand identity model, otherwise known as the *Brand Identity Prism* (see Appendix 2), is used to specify these associations (2012). This model represents six facets:

- » Physique: The brand's most salient features.
- » Relationship: The brand's counterpart given by the brand to its consumers.
- » Customer Reflection: The brand's "projected / desired" consumer type.
- » Personality: The brand reflected as a person.
- » Culture: The brand's set of values feeding the brand's inspiration – the core of the brand.
- » Self-Image: The brand's aspired target's internal mirror.

Brand identity thus, can be applied to derive a holistic understanding of the brand, regardless of whether it is a product, service, individual, company or country (Keller, 2001).

2.2.2 Brand Positioning

Having established brand identity, a company must decide how it will differentiate the brand's offer. This is the brand positioning; the place a brand should occupy relative to competitors' in consumers' minds.

For the purpose of this work project, Keller's definition is utilized. According to Keller, a brand positioning describes the optimal points of parity and points of difference brand associations that enable competitive advantage in the marketplace (2013). This concept provides signals to consumers about the goal and benefits they can expect to achieve by choosing the brand versus that of a competitors'. To formulate the brand positioning, brand managers must determine (1) who the targeted consumers are, (2) who the main competitors are, (3) how the brand should be similar to these competitors, and lastly (4) how the brand should be different from them (Keller, 2013). Traditionally, as reiterated by Keller, a brand is managed through the use of one brand identity and one positioning. However, if the brand targets very different groups of consumers, the single positioning principle may not be the most successful strategy; here one brand identity with several positionings addressing different targets is best utilized.

The objective of this work project is to develop and recommend a new brand positioning for the nation brand Portugal targeting the Chinese tourists traveling independently.

2.2.2.1 Target Market & Competition

Keller defines a target market as "the set of all actual and potential buyers who have sufficient

interest in, income for, and access to a product” (2013, p.79). Market segmentation however, divides the target market into “distinct groups of homogeneous consumers who have similar needs and consumer behavior, and who thus require similar marketing mixes” (2013, p. 79). The nature of competition refers to the other brands in the consideration set of the target market.

2.2.2.2 Points of Parity

Points of parity (POPs) are points of differences that are “not necessarily unique to the brand but may in fact be shared with other brands” (Keller, 2013, p. 84). These points of differences are often attributes of benefits. POP associations must be identified if consumers are to perceive the brand as a legitimate and credible player within that frame. This shared feature or POP, does not literally have to be equal to other brands, however, a consumer must perceive this dimension *good enough* for it to be considered alongside its competitors. POPs represent core needs of the market (Keller, 2013). According to Keller (2013), there are two main types of POPs:

- » Category POPs represent necessary, though often insufficient, features and conditions for brand choice.
- » Competitive POP’s are associations designed to negate competitors’ PODs.

2.2.2.3 Points of Difference

Unlike POPs, points of difference (PODs) associations are attributes that should make the brand unique; they provide a blatant benefit and reason why to purchase one brand over another. PODs can be classified into being either “functional, performance-related considerations or as abstract, imagery-related considerations” (Keller, 2013, p. 83). These associations depend on perceived uniqueness by consumers.

2.2.2.4 Reason to Believe

The simplest and most effective approach when considering the positioning of the brand in the hearts and minds of consumers is to realize that there is a difference between stating the brand’s unique position and getting consumers to truly believe it. This is the brands proof point or *reason to believe*. To give consumers desirability, the brand must be (Keller, 2013):

- » Relevant: Consumers must find the POD personally relevant and important.
- » Distinct: Consumers must find the POD distinctive and superior.
- » Credible: The brand must offer credible reasons for choosing it over other brands.

A reason to believe should always accompany the brand positioning to provide consumers support in accepting the brands unique benefits as true and convincing.

2.2.3 Brand Image

Unlike the brand identity, brand image stems from an individuals' perception of the brand (Kapferer, 2012). According to Keller (2001), brand image and the different kinds of intangible perceptions, either negative or positive, that can be linked to a brand, can include product attributes, a particular symbol, country, or region and can also be broken down into:

User Profiles

This association involves the type of person or organization who uses the brand – both actual and more aspirational users. The user profile may be composed of both demographic factors, such as gender, age, race, or income, but can also include physiographical factors, such as attitudes toward life and social issues.

Purchase & Usage Situations

This set of associations that aid in the brand image are related to how the brand could or should be purchased and used.

Values

This is related to the values and traits that are associated to the brand by consumers.

History, Heritage & Experiences

Lastly, brands often take on associations that are related to personal experiences or past behaviours of friends or family or noteworthy events in the brand history.

2.2.4 Brand Equity

Much like the term brand, the definition of brand equity is still debated among academics. This is largely attributed to the fact that a brand can serve a variety of different purposes over any certain amount of time, varying from short- to long-term. Keller outlines the main understanding of brand equity as that of a customer-based approach (otherwise known as customer-based brand equity and hereafter CBBE) which focuses on the connection or the attachment customers have to the brand (2013). This work project utilizes Keller's CBBE approach. Keller's approach states that "a brand has positive customer-based brand equity when consumers react more favorably to a product and the way it is marketed when the brand is identified than when it is not" (2013, p.69). Conversely, when customers react negatively toward a brand, the brand will reflect negative customer-based brand equity (Keller, 2013).

2.3 Branding Concepts Applied to Nations

The following section attempts to create understanding of what a cohesive brand identity and positioning for a place, or in this case, a nation, are:

2.3.1 Nation Branding

Much like a product, service, individual, or company, a country competes with others for attention, seeking competitive advantage. First coined by Anholt in the 1990's, this concept is called nation branding. However, for clarification purposes, nation brand and national branding should be distinguished from one another.

A nation brand refers to a country, or nation and its interactions, differentiation, perceptions and relevance of the nation in question. For further clarification purposes, a nation is defined as a group of people who share descent, history, traditions, culture, and usually language within a specified region. Much like any other brand, a nation brand is established through a combination of multi-dimensional elements. Placed together, these elements create a unique and culturally grounded differentiation from other nations (Dinnie, 2008).

These elements are three-fold. As the AMA outlines, the first constitutes the visuals that make a nation brand. The second is described by Anholt (2004) as the understanding of people's perception and competence towards that nation. This perception is developed through the Nation Brand Hexagon (Anholt, Nation Brand Index, 2016) devised of: tourism, exports, governance, investment and immigration, cultural and heritage, and people (see Figure 1).¹

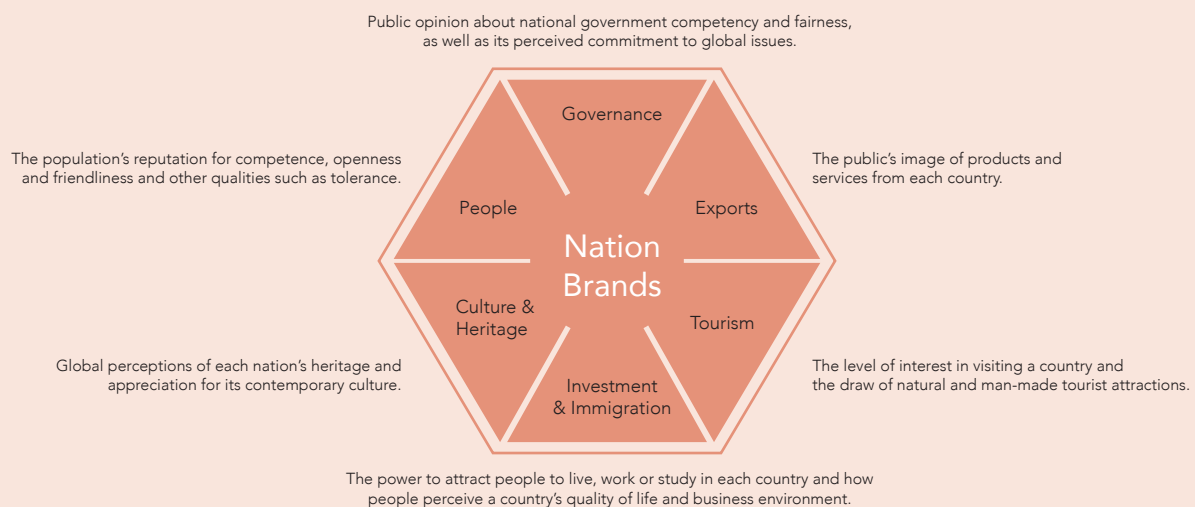


Figure 1: Nation Brand Hexagon (Anholt, Nation Brand Index, 2016)

¹ Due to the nature of this work project, national governance is not considered.

The last element that constitutes a nation brand is the combination of its identity and image; much like any other brand. This is further explained by Walsh and Wiedmann as a “result of a specific national reality, its perceptions and evaluations by many different internal and external stakeholders (brand images), and is characterized by a specific overall reputation” (as cited in Dinnie, 2008, p. 158). These three elements come together to create a nation brand; making it more complex than any other consumer goods brand on the market.

However, regardless of complexity it is crucial for a nation brand to devise, manage and control sources of competitive advantage, to attract attention and trust across, but not limited to, Anholt’s Nation Brand Hexagon.

Whether speaking of a brand or a nation brand, the benefits created and differences made can be applied to both, in that a distinct and attractive nation brand:

- » enables countries to consistently compete against other countries for respect and attention;
- » attracts and motivates tourists to visit;
- » and in turn enables profitability, market share, and loyalty of consumers;
- » and can create a positive image and reputation for national products and services

(World International Property Organization, 2005; Haigh, 2015).

2.3.2 Nation Brand Positioning

As was assessed in Chapter 2.2.2, brand positioning is composed of four elements, one of which is the target market. Thus, with more than one market at play, including residents – native and immigrants, investors – local and global, tourists – internal, external and foreign, public opinion – leaders and broadly defined society, the identification of a nation brand’s targets is extremely difficult, particularly because these are not mutually exclusive (Janiszewska & Insch, 2012). For this reason, in the context of nation branding, there are four major positioning strategies depending on the approach to the target group:

Concentrated Positioning

The concentrated position strategy, or the positioning towards the most significant target market, usually results from what Kotler et al. refer to as the ‘natural’ target market. This ‘natural’ target market stems from already shaped preferences to the nation’s existing features (1993). This strategy is often used for nations characterized by unique attractions or features (Janiszewska & Insch, 2012).

Exclusive Positioning

This strategy is based on a different positioning for each target market (i.e. tourists, investors, governments). Thus, an exclusive positioning strategy consists of implementing separate positionings under the same identity for different targets. This approach is often applied to expanding marketing activities into markets that have not been penetrated (Kotler, 1993).

Interrelated Positioning

An interrelated positioning is based around the idea that though there are different positionings for different targets, that they are related through one common element. This common element is the core of the brand – which should be left untouched and constant regardless of the positioning. Fiona Gilmore, CEO of brand and design consultancy Springpoint, refers to this core as the spirit of the nation, outlining that “although identifying and articulating this spirit is difficult, it is very real and palpable” (2002).

Uniform Positioning

A uniform positioning strategy defines the same positioning for all, diverse target markets, unlike the concentrated positioning, which focuses solely on one priority or more target markets. This strategy is the most explicit of all. However, by suggesting one common positioning for all target markets the nation brand “must be broad enough in its cognitive sense to enable developing a common positioning statement” (Janiszewska & Insch, 2012, p. 16).

3.0 Portugal

3.1 A Brief History

The making of the country emerged in 1143 and has endured a long and rich history since. People have inhabited the land as early as the Stone Age, however, like much of Europe, the Romans occupied and dominated much of the land thereafter. Not until the 15th and 16th century was Portugal considered a world power, having built a vast empire of trading posts, territories and colonies (Birmingham, 2003). It was during this time that the country of Portugal, known largely by their iconic seafaring explorers, Vasco da Gama and Ferdinand Magellan, became known simultaneously as Portucale, Portugale, and Portugalia. To this day, despite numerous upheavals, disputes, and feuds and an official democratization in 1974 the country remains the Republic of Portugal (Hermano Saraiva, 2012).

Today, Portugal’s population is estimated at 10,825,309 with an annual growth rate of 0.09%, with rural populations declining and populations in cities and suburbs growing (Central Intel-

ligence Agency, 2016).

As the Western most country of the European continent, Portugal spans the entire North Atlantic coastline – a total of 1,793 kilometers. Despite the country being largely dominated by the sea, Portugal still boasts a range of geographic variety considering its size, spanning across a total of 91,470 square kilometers (land) of northern mountainous interior to the south's rolling plains and sandy beaches between (Central Intelligence Agency, 2016).

Heritage, tradition and cultural expressiveness are deeply rooted in Portugal, its people, and their outlook. Though the Portuguese are often being confused for their Spanish neighbor they have their own distinct way of life (Encyclopaedia Britannica, 2016). As a rich seafaring culture and history of trading goods, the Portuguese character is still very much influenced by the sea and the artisanal way of life, cherishing and placing great importance on their heritage.

Portugal, although small, is home to fifteen United Nations Educational, Scientific and Cultural Organization (UNESCO) World Heritage Sites. This places Portugal 8th in Europe and 17th in the world. Among these sites, UNESCO has named a number of architectural sites (World Heritage Convention, 2016), see Appendix 3 for details.

3.2 Portugal's Current Travel Destination Situation

Portugal suffered greatly from a great recession between 2010 to 2014 (Portugal P., 2015). Today, prospects are much less clouded for Portugal (see Appendix 4). As outlined by Pedro Portugal in his report, *The Portuguese Economic Crisis*: “External imbalances are considerably reduced, public finances are viably improved, and the financial conditions are stabilized. Portugal is following a path comparable to the one successfully pursued by Spain and Ireland and is regaining gradually its economic competitiveness” (2015, p. 8). However, despite the recession, the tourism sector supported the economy. In the past, according to *Turismo de Portugal* the country, though still among the world's top destinations, had progressively lost market share (see Appendix 5) by destinations such as Turkey and Hungary in Europe, and Thailand and Malaysia in Asia (2007). Today however, the interest in Portugal is again on the rise and thus proving the (potential) strength that lies in its tourism sector even during financial hardships.

In 2014 and 2015, Portugal was ranked 50th most valuable nation brand globally, with a 20% increase in value from \$114 USD billion to \$137 USD billion with an AA brand strength ranking from the annual *Brand Finance Report* (2015), see Appendix 6 for details.

3.3 *Turismo de Portugal*

Upon understanding Portugal, its offerings and contributions that lead to its comprehension of a nation brand image, this chapter seeks to present a review of the current nation brand Portugal and the role of *Turismo de Portugal*. This section's content has largely been extracted from conversations and materials provided by *Turismo de Portugal's* Communications Director, Dr. Susana Cardoso, and Dr. Claudia Miguel, Head of Trade Relations.

Today, *Turismo de Portugal* is integrated within the Ministry of the Economy, and is the governmental organization that aims to foster the development of tourism within Portugal. Thus, though utilized, most campaigns predominantly weren't creatively developed until the early 1990's, with the majority of efforts mainly institutionalized due to governmental control (Filipe, 2010).

Turismo de Portugal does however, focus on a well-defined advertising philosophy (Miguel, 2016). This philosophy is centered around *Turismo de Portugal's* purpose, and for lack of a better term, brand core of 'humankind'. According to *Turismo de Portugal*, Portugal's purpose as a country should be to "treat everyone well, wherever they come from" (Portugal, 2015). This has manifested through *Turismo de Portugal's* advertising philosophy, which has been influenced by the five shields on the Portuguese flag to form the five principles of purpose. The following pillars outline the purpose as stated in *Turismo de Portugal's* 2015 strategy video:

- » People: The focus of our actions.
- » Pertinence: If we want people to hear us, we need to be pertinent.
- » Proposition: The purpose of making every visitor feel welcome should inspire and mobilise all of us as a country.
- » Portability: Today people carry the world in their hands, thus, we [*Turismo de Portugal*] must ensure that everyone is carrying us around with them.
- » Sharing: Telling stories is the new way of advertising, being shared is a new type of media.

Within the *National Strategic Plan for Tourism*, 21 outbound target markets were identified due to their growth potential – including China, "where the objective is to increase market share, while strengthening the notoriety of Destination Portugal" (*Turismo de Portugal*, Portuguese Ministry of Economy & Innovation, 2007, p. 6). Within this plan, Miguel reiterates that the goal is to place Portugal among first wave European travel destinations, which are characterized by a travelers ranking of these respective destinations (2016). For Chinese travelers, first wave

European travel destinations are France, Germany, Italy, the United Kingdom and Switzerland, (see Appendix 8 for more information) (Global Blue, 2016). Thus, little activity prior to Q4 2013 within the Chinese market, *Turismo de Portugal* set out to gain traction utilizing a strategy focusing on three pillars: (1) trade, (2) digital, and (3) airfare - whilst utilizing *Turismo de Portugal's* advertising philosophy (Miguel, 2016).

3.4 Chinese Traveler Portfolio

To fully understand the magnitude of the above outlined plan, it is crucial to understand the Chinese traveler portfolio – both the target market as a whole and the directly relevant target market segment. With a total population of 1.382 billion people, China and Chinese tourists are among the greatest and most impactful (potential) tourists (UNdata, 2016), both globally speaking and for Portugal. In 2015 alone, China had a total of 120 million outbound visitors (Travel China Guide, 2015), with Goldman Sachs predicting a boom over the next 10 years amounting to 220 million Chinese who will travel in 2025 (2015). The main driving forces for this boom are largely fueled by experience-hungry millennials, rise in personal incomes, appreciating currency, improved travel facilitation, including relaxing of restrictions and visas on foreign travel, and generally a growing middle class (The Goldman Sachs Group, 2015).

Though Chinese travel is still largely within Asia, with many Asian countries only a 3 to 4-hour flight from China, Europe is considered a prestigious place to visit and in 2015 drew in a total of 13.2 million trips from China (see Appendix 7 for outbound trips from China to Europe).

To understand which Chinese tourists travel to Europe, it is necessary to identify and understand their preferences and characteristics, by gender and age, mode of travel, reasons for travel and generally where they travel to within Europe. However, it must be noted that the majority of outbound trips are handled by travel agents. In 2014, the China National Tourism Association (CNTA) reported that 2,151 (of 24,900) travel agencies were licensed to sell international travel; with only three foreign travel agents (see Appendix 16 for more details). To date Chinese tourists traveling outside the country, still prefer to rely on travel agents, “not only for the convenience but also because agents help bridge cultural differences and language barriers” (EU SME Centre, 2014). Thus, it is important to note that though Chinese consumers trust their travel agents, many do not trust other official sources for information, particularly governments and big corporations, making social media and word-of-mouth especially significant in their traveling decisions (Chiu, Guild, & Orr, 2015).

Gender & Age

According to the Goldman Sachs' report (2015), the majority of current outbound Chinese travelers are Millennials, aged between 15 - 35 with statistics showing that 64% are women (Travel China Guide, 2015). Particularly in Europe, there is a trend towards feminization of Chinese tourists.

Modes of Travel

As outlined by Euromonitor International (2016) the types of Chinese tourists traveling to Europe can be outlined as:

- » Tour groups: The majority of tourists from China travel in tour groups making it easier to attain a visa within Europe and normally includes a package deal, which includes hotels and travel. This mode of travel is particularly popular for those Chinese who are traveling for the first time outside of China and speak little English or other European language. Tour groups largely travel to first wave destinations within Europe and are largely through travel agents.
- » Individual travelers: Though still a niche market, individual Chinese travelers are growing among the educated middle class whose English or European language skills enable ease of communication abroad. Close families and sometimes one or both sets of grandparents accompany them on their travels to Europe. According to the CNTA, "47% of Chinese outbound travelers travel with their family, while 24% travel with friends" (2014).

As outlined, leisure travel has begun to represent a greater share of total Chinese travel demand. Thus, for the purpose of this work project, the focus will be on Millennial individual travelers. These Chinese tourists not only largely choose where to go on their own, but they usually also aren't on their first trip outside of Asia. Additionally, and quite importantly, though they may not be fluent in English or other European languages they are not afraid of the unknown.

Reasons for Travel

Generally speaking those Chinese travelers in focus for this work project travel for two distinct reasons: to have fun and to shop. Particularly when referring to the Millennials, they seek to spend their leisure time on fun related experiences. The key driving forces include sports, travel, online gaming, media and eating out, as well shopping (The Goldman Sachs Group, 2015). Additionally, these Chinese Millennial individual travelers are also largely characterized by their eagerness for unique travel experiences: "They aren't as interested in hitting the must-see landmarks...they seek out uncommon destinations based on classy hobbies like wine apprecia-

tion to express their individuality” (Trivett & Staff, 2013).

Where They Travel

Identifying where the Chinese go is significant in understanding the increasingly expanding Chinese travel market. As has been assessed, the Chinese desire to travel for fun is significant. Thus, though visa requirements play a large role in the decision making process, tourism assets are an important driver. In addition to the destination offerings, whether it be world heritage sites or additional attractions, price differentials play a key role (The Goldman Sachs Group, 2015). Additionally, the majority of the Chinese travel to major cities, accounting for over 70% of Chinese international travel, excluding Greater China or Southeast Asia Region (SAR) (Tourism Economics, 2015). According to Global Blue, 41% of Chinese traveling, plan to visit Europe, particularly to first wave destinations (2016) (for full breakdown see Appendix 8). The Chinese also think highly of and consider the safety and security of destinations, with 56% citing this an important deciding factor (Global Blue, 2016).

4.0 Addressing the Work Project Challenge

Nations, regardless of their image, are constantly confronted by a range of issues. To add, nations that have been tainted by damaging connotations often struggle due to a negative or out dated image. Given that Portugal is just emerging from a recession, gaining traction abroad, particularly outside of Europe, could be an uphill battle. The challenge for Portugal is to depict itself in an attractive manner, particularly to those nations and travelers that are relatively un- or ill-informed. Thus, given the observed travel preferences of Chinese tourists still being tour based, traveling as “part of package trip involving group tours with multiple destination stops”, Portugal’s country profile, and the vested interest of *Turismo de Portugal* it is crucial to understand the Chinese perception of the nation, after having visited Portugal, and how to embed these positive attributes in the nation brand Portugal (InterContinental Hotels Group, 2014, p. 16).

4.1 Market Research

Having already established a theoretical basis, this section presents the primary research that was developed to gain an understanding of the Chinese perception of Portugal. The secondary data analysis presented over the previous sections allowed for the collection of valuable information that was taken into account to finalize the scope of the primary research in the form of qualitative one-on-one interviews and an online survey.

4.1.1 Methodology

The main primary research comprised of semi-structured in-depth interviews in English over a period of two months with 25 Chinese nationals, aged between 25 – 60 years, that have visited Portugal within the last two years, as independent travelers. Interviews were conducted until a point of saturation was reached with little new findings revealed. An interview-guide was utilized to ensure different themes and questions were explored and to give a consistency throughout all interviews (see Appendix 9). The interview guide was built to explore Portugal's nation brand, nation brand identity, nation brand, image and equity among respondents.

Additionally, to gain understanding from a different perspective, conversational interviews with industry experts Dr. Claudia Miguel, Head of Trade Relations of *Turismo de Portugal*, and Dr. David Kolinski, Business Development Manager at Tempus / Boutique dos Relogios were conducted (see Appendix 11-12). This allowed for a more wholesome collection of valuable insights. Lastly, we developed a short final online survey (see Appendix 13) to enable insight and a broader perspective on how Chinese who have not visited the country before view Portugal as a nation brand.

Format	Sample Size	Target	Procedure
In-Depth Interviews	25 ²	Chinese nationality, aged 25-60, who have traveled to Portugal within the last two years	Pre-Recruiting Questionnaire and Interview Guide, conducted over Skype, telephone, face-to-face either on the street or by appointment
Expert Interviews	2	Experts on Chinese nationals within Portugal	Informational and conversational face-to-face meeting
Survey	30	Chinese nationals, aged 25-60, who have not traveled to Portugal	Anonymous, online

Table 1: Primary Research, Sample Overview (Based on Own Research, 2016)

The main focus of our analysis is on the interviews with Chinese tourists, with the survey and industry experts either confirming or contradicting results (for full breakdown of the main sample, please see Appendix 10).

² The data collected from these respective 25 interviews showed that 10 respondents were male and 15 were female. The majority of respondents were aged between 25 - 30 with all respondents having had last visited Portugal within the last two years (for full breakdown, please see Appendix 10).

4.1.2 Limitations

In addition to time restraints, limitations for the exploratory interviews with Chinese nationals included the limited sample size due to the number of qualified respondents within reach. Additionally, language, cultural constraints, and overall comfort level of respondents created a barrier in conducting interviews, particularly with those individuals spoken to in person and not over Skype or via telephone.

4.2 Main Insights from Primary Research

4.2.1 Initial Expectations of Chinese Tourists visiting Portugal

Overall, our research suggests that Chinese travelers had little initial expectations upon arriving into Portugal. This was not the case for tourists traveling to many of the first wave destinations in Europe, where expectations were numerous and high – i.e. with many immediately citing Switzerland's pristine Alps and luxury market when asked about expectations in other countries.

4.2.2 Low Expectations according to Chinese Tourists

The following extracts highlight the general underwhelming initial expectation of Portugal:

I didn't expect much. It's not [a] very developed country, perhaps it is too old or perhaps for other reasons (I5: Male, aged 25-30, in Portugal 6 mo. ago).

I just want[ed] to experience different cultures in this Western European country (I3: Female, aged 25-30, in Portugal 6 mo. ago).

I had no expectations because I did not know much about the country before traveling to Portugal (I15: Female, aged 25-30, in Portugal 1 yr. ago).

As the statements show, the general lack of awareness and comprehension of Portugal demonstrates what could be attributed to what many respondents claim to be the lack of information readily available in China about Portugal. In some cases, respondents explained that the information available about Portugal was not in Chinese, limited, and mostly outdated, making it difficult for non-native speakers to decipher any material. This was the case for both travelers with the intention of visiting the country and those who had never been.

However, those who did have (low) expectations based on (wrong) assumptions upon visiting the country, stated that their experience far exceeded anything they expected to find after actually experiencing the country first-hand:

Before I came to Portugal I thought it was very poor in relation to Western Europe. I thought the Lisbon city would not be clean or modern, but once I came I realized it was very clean and a good balance between tradition and modernity (I1: Male, aged 25-30, in Portugal 6 mo. ago).

I was surprised to find [Portugal] in the condition it was in. I remember it being full of life when I had expected it to be kind of depressing and sad (I22: Female, aged 31-40, in Portugal 1 yr. ago).

I came from central Europe where it was cold and wet and in Portugal it was nice. It was a good surprise for me because I had thought it would be a lot like the rest of Europe (I11: Male, aged 25-30, in Portugal 1 yr. ago).

4.2.3 Similarities to Other Southern European Countries

Many respondents actually expected and assumed that the country would be similar to other Southern European nations, comparing Portugal to Italy, Spain, and though less frequently, France. Interestingly enough, one respondent explained that many “[Chinese] people would associate Spain with Portugal. In the Chinese language the name of Spain is similar to Portugal. They associate it by means of their name” (I5: Male, aged 25-30, in Portugal 6 mo. ago). It can thus be deduced that for many Chinese, Portugal is simply viewed as an extension of Spain. This idea was confirmed by Miguel who explained that many Chinese cross the border between the two countries simply to add another check mark to their list of visited European countries (2016). Other respondents prior to visiting Portugal, believed that “it might be a normal European country, with cities old and small, and people might be cold and dislike foreigners” (I2: Female, aged 25-30, in Portugal 6 mo. ago); an opinion that again, demonstrates the general lack of understanding towards Portugal and its people.

4.2.4 Perceptions After Visiting Portugal

To make Portugal interesting and worth travelling to it is important to understand what the Chinese liked and to understand what they believe Portugal has that makes it something special and unique compared to other European destinations. Thus, to comprehend if and where Portugal may have some POD's compared to other travel destinations, particularly within Europe, respondents were asked to explain topics (see Appendix 9) outlining such unique experiences. The results can be grouped into the following, recurring, non-exhaustive list:

Natural Beauty

Among all respondents, Portugal's natural beauty was mentioned in some form, from its beautiful landscapes ranging from sandy beaches to rocky cliffs and lush mountains. Respondents showed a huge appreciation to Portugal's natural beauty:

Let me just build a picture – Portugal is quiet, small, united, and lovely country. And its natural scenery is also quite good. That is probably my description (I5: Male, aged 25-30, in Portugal 6 mo. ago).

I think it's a really beautiful country, with a lot of natural landscape...(I1: Male, aged 25-30, in Portugal 6 mo. ago).

It is very versatile. We traveled from North to South and it impressed me how different such a small country is – it takes your breath away (I21: Male, aged 31-40, in Portugal 1 yr. ago).

This was confirmed by the online survey, with 'Natural Beauty' and 'Environmental Friendliness' outranking all other criteria in regard to key associations to Portugal.

Climate

The analysis revealed that the majority of Chinese valued the Portuguese climate (see illustrative quotes below). For those interviewed, answers were nearly unanimous, showing that temperate, sunny, and light climate association were now tied to the country.

...it has a great weather, never too hot or too cold, almost 300 sunny days per year, and the air is super clean, especially compared to my hometown, Beijing (I2: Female, aged 25-30, in Portugal 6 mo. ago).

Portugal stood out because of its wonderful environment, the weather, the beach, the city...(I16: Female, 51-60, in Portugal 2 yrs. ago).

To add, the majority of respondents commented on the air quality, especially stemming from those who had just come from Central Europe.

Heritage & Culture

Upon visiting Portugal, respondents were pleasantly surprised by the local culture through Portugal's rich heritage and history. Though we had been made aware of the importance Chinese lay on UNESCO world heritage, this was a recurring remark in all interviews. A common re-

sponse was found in respondent I2 who stated, “Portugal is very culture-oriented, we can find lots of cultural marks in daily life, like the food, architecture, designs etc.” and respondent I7 who states, “the country’s heritage has been maintained fairly well and makes the country in a poetic atmosphere.” To add, the survey results also concluded that Portugal is most expert in “Food & Beverage”, though not explicitly tied to culture, does signify the Portuguese way of life. Based on their experiences and relations with the Chinese in Portugal, this was confirmed by expert interviews who concluded that aside from shopping, heritage and culture were among the top reasons for the Chinese to choose a European destination.

People & Language

The Portuguese and people in general were topics that were mentioned throughout all interviews and can be stated as one of the most positive associations respondents had with Portugal. Analysis indicated that the Chinese valued the Portuguese hospitality and their friendly, warm and polite demeanor:

I found most of the Portuguese people friendly and polite, [they] offer help to tourists and foreigners...(I2: Female, aged 25-30, in Portugal 6 mo. ago).

The local people in general are very nice and happy
(I7: Female, aged 25-30, in Portugal 6 mo. ago).

To note, this was particularly the case after experiencing other European destinations, where many respondents did not feel as welcomed as they did upon arriving into Portugal. “I felt that especially in Porto and Lisbon, people were very helpful. People were not so closed [off]” (I7: Female, aged 25-30, in Portugal 6 mo. ago).

Additionally, many Chinese spoke of their fear not being able to communicate with locals while abroad due to language barriers. Thus, the use of the English language was highly evaluated when choosing a destination in Europe. For this reason, the Portuguese fluency in English highly valued upon visiting and later cited as being something to share among Chinese travelers. As a whole, the Chinese viewed Portugal as an open-minded country willing to help non-native Portuguese speakers.

Safety

As was assessed in Chapter 3.4, safety of destinations plays an important role among Chinese travelers. Following the wave of European terrorist-related attacks many respondents voiced

their concern regarding safety – particularly on the European continent. Many reportedly initially didn't even consider Europe, but rather looked at other, closer Asian countries. However, with the prestige and fascination tied to traveling to Europe and experiencing cultures overruling safety, many looked at northern or southern European countries with less turmoil. Respondents believed Portugal to be among one of the friendliest and safest countries, providing a safe-haven. Respondent I25 states, "I never felt in a threat in Portugal" (Female, aged 31-40, in Portugal 6 mo. ago). This notion was underlined by the expert interviews confirming that safety plays an increasingly important role in Chinese travel.

4.2.5 Positive Perceptions according to Chinese Tourists

Though Portugal does not fall among first wave destinations within Europe, the current associations tied to Portugal are positive – both from those who have visited and those who have not. When respondents were asked what top of mind image they would use to portray the country the following extracts show the majority opinion:

Sunshine, beach, and sea

(I3: Female, aged 25-30, in Portugal 6 mo. ago).

I think of a bright sunset over water

(I24: Female, aged 25-30, in Portugal 6 mo. ago).

Portugal is sometimes very poetic. A place can make people enjoy the moment

(I13: Male, aged 31-40, in Portugal 6 mo. ago).

This is very much in line with the expert's claim that at present, Portugal is experiencing an influx of Chinese tourists looking for sunshine and beaches, in what is referred to as "the wave of sun and sea" (Miguel, 2016). Other imagery included the capital's Commercial Square (Praça Comercio), Tower of Belém (Torre de Belém), Fado (traditional Portuguese music and UNESCO world heritage), and cobblestone lined streets (calçadas). Survey results also showed that top associations were 'Natural Beauty', 'Environmental Friendliness', 'Historical Points of Interest', and 'Safety and Security' – despite never having visited the country.

4.2.6 Negative Perceptions according to Chinese Tourists

It is important to understand where pain points lie in order to avoid these pitfalls when formulating a nation brand positioning for Portugal. The answer was nearly unanimous, with 20 out of 25 respondents highlighting low working efficiency in their answer, whether in regard to

public transportation, governmental activities, or generally in regard to the slow pace of life. The following extracts highlight these perceptions:

Low working efficiency, sometimes with even bad quality and attitude

(I17: Female, aged 25-30, in Portugal 6 mo. ago)

Unreliable transportation system, especially the busses

(I12: Female, aged 25-30, in Portugal 1 yr. ago)

They tend to do things in a very slow way

(I17: Female, aged 31-40, in Portugal 6 mo. ago)

Low efficiency in general

(I2: Female, aged 25-30, in Portugal 6 mo. ago)

To add, many respondents voiced that they felt Portugal was geographically very inaccessible, particularly when comparing it to the rest of Europe. Portugal's remoteness, both geographically and due to sheer air travel accessibility, often swayed visitors from not choosing Portugal over another European destination:

Most direct flights from China fly into Paris or other big cities for example. Lisbon [or Portugal] must be on the [travel] agenda or at least a point of interest so it can be planned a little ahead of time because getting there isn't as easy as it would be from Paris to Zürich by train for example (I14: Male, aged 31-40, in Portugal 1 yr. ago).

4.2.7 Current Portugal Nation Brand Positioning

Upon analyzing all primary and secondary research and to fully assess, bring together and highlight all insights collected, a SWOT Analysis was conducted. Please see the following page, for Table 2.

Strengths	Weaknesses
<p>Natural Beauty & Climate: Portugal is recognized as a country full of beautiful landscapes and temperate climate.</p> <p>Heritage, Culture & Food: Portugal surprises with its rich heritage, cultural sites and traditional cuisine.</p> <p>People & Language: Portugal is cited as a friendly and hospitable nation.</p> <p>Safety: Portugal is identified as one of the safest European countries.</p>	<p>Reputation: Portugal is overshadowed by neighbor-ing country Spain and other European first wave destinations.</p> <p>Efficiency: Portugal is viewed as an inefficient country.</p> <p>Economy: Portugal is [still] viewed as an underde-veloped country with an economic mess.</p>
Opportunities	Threats
<p>Latin Flair: Portugal is grouped among the Southern European nations, recognized as friendlier countries.</p> <p>Relaxed: Portugal is viewed as a stress free, "chill", country with a relaxed atmosphere.</p>	<p>Proximity: Portugal is perceived to be located too far from the rest of western Europe.</p> <p>Spain: Portugal is often overshadowed or viewed as an extension to Spain.</p>

Table 2: SWOT Analysis (Based on Own Research, 2016)

5.0 Recommendations

Taking into account the research viewpoints expressed in the Literary Review and based on a thorough analysis of the 25 in-depth interviews and insights collected from the expert interviews and online survey an important number of elements, including the current perception of Portugal and positive associations, appear to represent the building blocks of what could contribute to Portugal's nation brand, positioning and strategy to attract Chinese tourists traveling independently. By implementing this positioning, it is believed that Portugal will become a stronger competitor against other current European first wave destinations for Chinese travelers.

5.1 Portugal Nation Brand Positioning Proposal

Due to the diversity of different targets, particularly due to the nature of Chinese independent travelers, an interrelated positioning is recommended. With an interrelated positioning, the core of the nation must be identified in order to understand how to position Portugal in relation to China's 25-60 year-old independent travelers. As has been assessed and uncovered through both primary and secondary research, Portugal's spirit is one of inviting, hospitable, relaxed tranquility and safety providing a unique experience among other European nations. It is this spirit that must remain untouched regardless of the target market.

5.1.1 Target Market & Competition

Chinese independent travelers, aged between 25-60 years old, have been identified as the priority market. A particular focus will be laid on the Chinese growing middle class who have

some level and comfort in speaking a non-native language. When evaluating the nature of competition, Portugal is a tourist destination regarded as a Southern European nation that strongly competes and can be replaced with its Iberian neighbor, Spain (for full breakdown please see Appendix 15).

5.1.2 Points of Parity

When assessing Portugal among its direct competitors – Southern European countries and more specifically Spain – Portugal's POP's are directly related and similar to their Latin origins. These perceived shared dimensions include the nation's similarities in culture, tradition and rich heritage. Additionally, Portugal's beautiful landscape ranging from sandy beaches to rocky cliffs and lush mountains are comparably similar to that of many other Southern European countries. This is particularly true of the perception of those tourists who have never traveled in them.

5.1.3 Points of Difference

Establishing POD's is a key task in brand positioning. The nation brand Portugal must be relevant, distinctive and believable to the independent Chinese traveler. Particularly for Portugal, that is often confused with Spain, it must ensure there are no generic or undifferentiated claims. However, by ensuring that the POD is distinct, the challenge lies in potentially alienating other target markets that may not feel the same draw to this particularly strong and compelling element. For this reason, an interrelated positioning is recommended. Taking this into account and understanding that the focus of Portugal's POD is aimed at Chinese tourists traveling independently, Portugal should distinguish itself as being a welcoming country. Portugal and its people are warm in nature, inviting and hospitable. To add, Portugal is a safe haven from the rest of Europe after recent terrorist attacks. Thus, it is recommended that the spirit of the nation or brand core of Portugal is its inviting and hospitable nature.

5.1.4 Reason to Believe

Appreciative of the many elements that make Portugal, its reason to believe should however, center itself around its generous and open-minded nature towards foreigners, its language savvy people who are particularly curious and open about the Chinese and their culture, and most importantly its safety in comparison to other European nations.

5.1.5 Portugal's Positioning Statement

Having identified the key elements in creating Portugal's nation brand positioning for China's

25-60 year-old independent travelers, the following positioning statement is suggested:

For Chinese travelers traveling independently, aged between 25-60 [target]
Portugal is a Southern European country and travel destination [frame of reference]
that is warm in nature, inviting and hospitable country,
offering greater tranquility and safety than in the rest of Europe [points of difference]
because Portugal is among the safest European countries, with open-minded and language savvy
people who are curious about the Chinese and their culture [reason to believe].

Table 3: Nation Brand Positioning Statement for Independent Travelers (Based on Own Research, 2016)

6.0 Additional Recommendations

There are several potential strategies for Portugal to leverage its positioning and in turn NBEQ among Chinese tourists traveling independently. It must first be understood that attracting Chinese tourists is a long-term objective that requires consistency among all stakeholders in delivering the message across all communication platforms. Thus, as outlined by Anholt's Nation Brand Hexagon, Portugal's nation brand must draw on all elements³ to be successful to provide a holistic (brand) image of the county (2016). Upon building Portugal's nation brand, additional recommendations should include:

Awareness

Among top priorities to improve and strengthen the Portuguese nation brand and to increase tourism from China to Portugal, is to create awareness; not of Southern European nations, not of Iberia, not of Spain, but solely of Portugal. This is largely due to the fact that there is almost complete lack of awareness of Portugal as a nation brand among the Chinese. The greater the consumer awareness and familiarity the more likely the connection and favorability towards Portugal, which in turn represents not only financial benefits but can create positive CBBE. So as not to disregard *Turismo de Portugal's* three-fold strategy, this can be done through education and utilization of the digital platforms popular in China to connect with this respective segment.

Highlighting Strategic Elements

As there were many recurring elements in the associations tied to Portugal, it is key that though

³ Initially, to exclude 'Governance' axis.

the positioning statement enables a throughout understanding of where to place Portugal in the minds of Chinese travelers, it is crucial to pinpoint what to highlight throughout all communications. Logically, and as Moilanen and Rainiso outline, not all countries compete on the same level financially, smaller and less strong countries must showcase themselves differently and must be able to stand out on their own (2009). For Portugal, which is not as strong as many of its competitors, this means understanding and articulating the most important elements, not all, so as not to dilute the meaning. The element that should be articulated in all communications targeted at acquiring Chinese tourists traveling independently is Portugal's inviting and hospitable nature.

Collaborating with Portuguese Companies

With alliances in the government, *Turismo de Portugal* is on its way to collaborate with Portuguese companies. However, a major crux is the antiquated or out-dated imagery many of Portugal's major companies still utilize. This in turn has tainted Portugal's own nation brand image; often being associated to damaging connotations caused by Portugal's major companies. Through collaboration with these major companies, an understanding of the importance their company plays on the tourist sector and the nation itself can be fostered. In doing so, it is likely that many companies will feel greater ownership towards their home-nation and in turn create a stronger and clearer message that is less dated and old-fashioned – benefiting not only themselves, but their country. The coordination of all these companies, or touch-points for a traveler, is complex. To begin streamlining messages, simple education among these players on how they too can benefit from a refresh and a positive nation brand image must be implemented. At a later stage, this may mean greater representation of Portugal's companies at international fairs and events, and in turn promoting the country's nation brand image.

Collaborating with Chinese Tourism

As has been assessed, majority of Chinese travel stems from travel agent bookings and information, whether these companies help book individuals on tour groups or for their individual travel on a flight to Europe. This is a huge potential for Portugal's nation brand. Though *Turismo de Portugal* fosters trade relations with China, there has been little contact directly with travel agents in China. With only three 'actors' having been granted outbound travel licensing (excluding domestic) it should be priority to approach these with the goal to heighten their knowledge on Portugal (EU SME Centre, 2014), for the full list, please see Appendix 16. This

namely so that (1) they themselves are a source of knowledge about the country and (2) so that they can direct and advise curious travelers towards an unforgettable trip to Portugal. This is also applicable to Chinese embassies and visa centers.

Potential Challenges

There are a range of potential challenges that could arise as a result of implementing the above recommendations. Among these challenges is the capacity of Portugal as a travel destination host. Though steps have been taken to enable the potential influx of (Chinese) tourism, including China's largest privately owned aviation company Hainan Airlines, purchasing 23.7% of Azul Linhas Aéreas Brasileiras (which owns a controlling stake in Portugal's national airline, TAP) in August of this year, it is not sufficient (TPN/ LUSA, 2016). This acquisition will likely mean the opening up of new flight routes between China and Portugal and stop-over options in Portugal opening more opportunities for North American travel from Asia. Though this enables direct access for tourism, obstacles of overstretching Portugal's main airports, is a concern. According to Euromonitor International, particularly Portugal's Lisbon airport is "already nearing maximum capacity" (2016). However, though not entirely unavoidable, tourism flows can be regulated to avoid this challenge.

6.1 Final Note

Conclusively, as quoted in Rice, Anholt outlines that nation branding is not a quick-fix: "I am dumbstruck by the naiveté of governments who think that people are going to change their minds about a country they are totally indifferent to just because of some... advertisement" (2010). As was assessed, a nation brand, regardless of its complexity, must differentiate itself and build a solid reputation beyond a simple campaign.

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